<u>How to:</u>
Record Mental Health, Substance Abuse, & Domestic Violence Assessments & Referrals in CAREWare

Requirements:

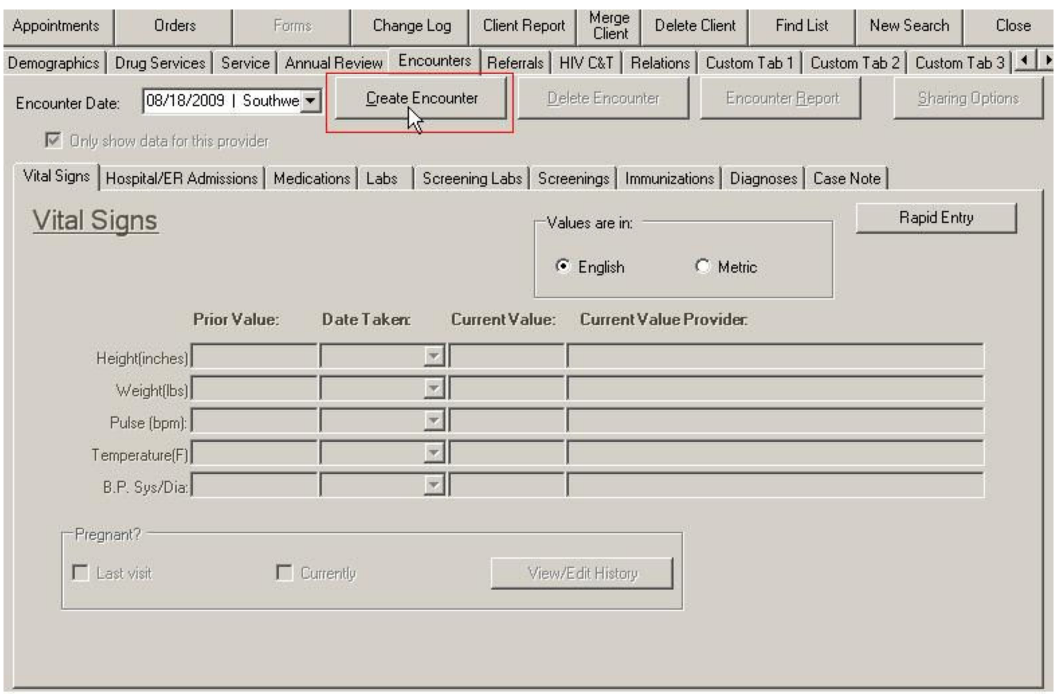
- All Part B case management agencies are required to enter the assessment results for any client receiving a case management intake service.
- All MHSA/DV assessments and results must be entered in CAREWare as described below, regardless of the outcome of the assessment.
- Any referral resulting from this assessment must be entered and tracked in CAREWare using the Referrals tab.

Follow these steps to enter assessment outcomes, referrals, and to follow-up on referrals.

1. Use the Find Client option from the main CAREWare menu to locate the client the assessment was completed on.

Once in the client's record, select the Encounters tab.

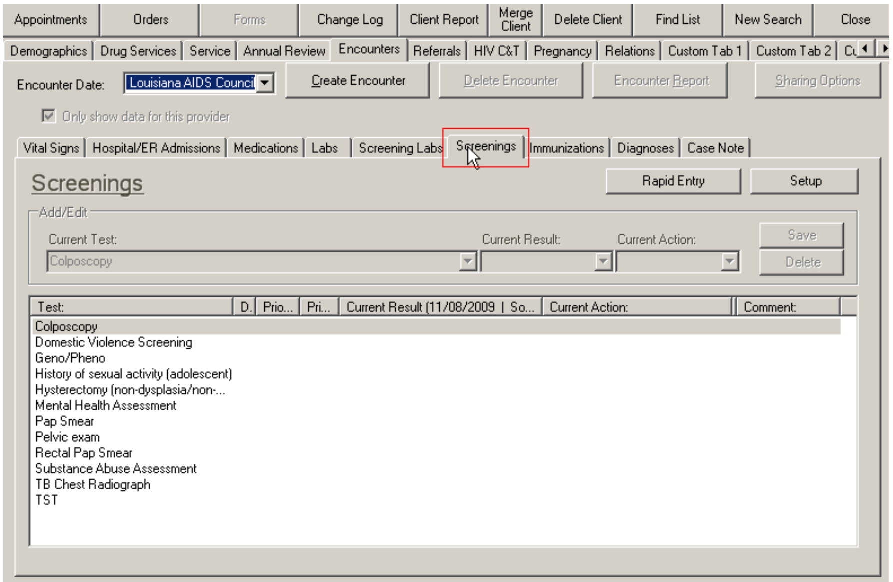
Click Create Encounter and set the encounter date to the date of the assessment.



2. After setting the encounter date, click on the <u>Screenings</u> tab.

The mental health, substance abuse, & domestic violence assessment results will be entered on this tab; any assessment completed on the date you set the encounter to should be entered under the same encounter date.

You should **not** add a new encounter for each assessment if they were completed on the same date.



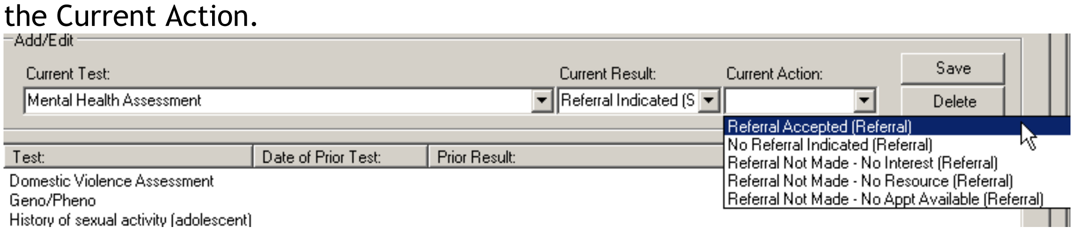
3. Add each assessment result by clicking on the name of the assessment in the Current Test box and filling in the appropriate information. Press the SAVE button after entering each assessment.

The names of the Current Tests you will be using are:
Mental Health Assessment
Substance Abuse Assessment
Domestic Violence Assessment

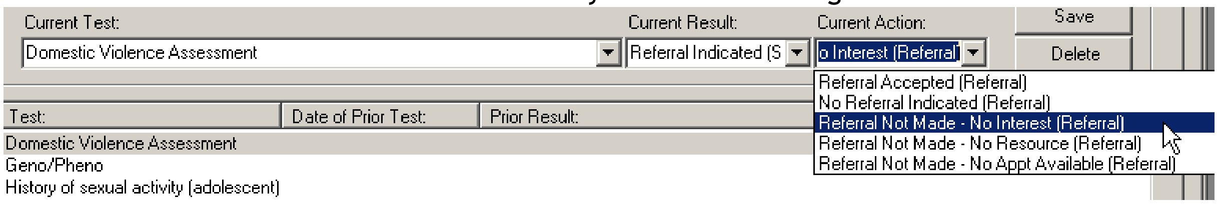
Each assessment will include a Current Result and a Current Action. Refer to the table below for the appropriate Actions to match with each possible Result.

Current Result	Current Action
Referral Indicated	Referral Accepted Referral Not Made – No Interest Referral Not Made – No Resource Referral Not Made – No Appt Available
No Referral Indicated	No Referral Indicated

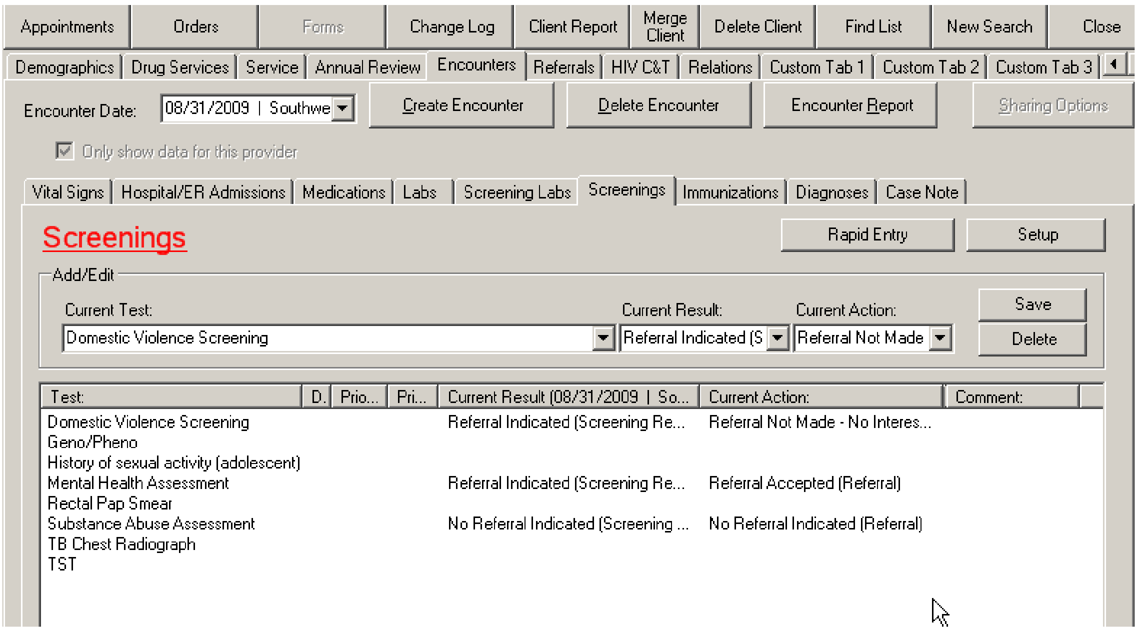
For example, if your client's MH assessment indicated that a referral is needed and the client accepts the referral, you would select "Referral Indicated" for the Current Result and "Referral Accepted" for the Current Action.



If a client has a referral indicated by their assessment but will not receive a referral for any reason, then select a Current Action that reflects why a referral is not given.

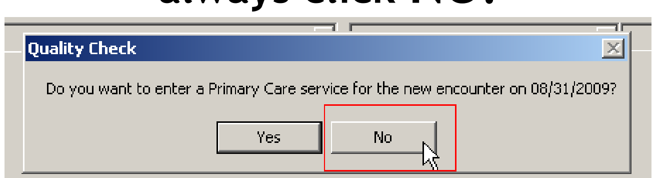


4. After saving each assessment, you should see it in the screening test summary. If it doesn't appear, it has not been saved.

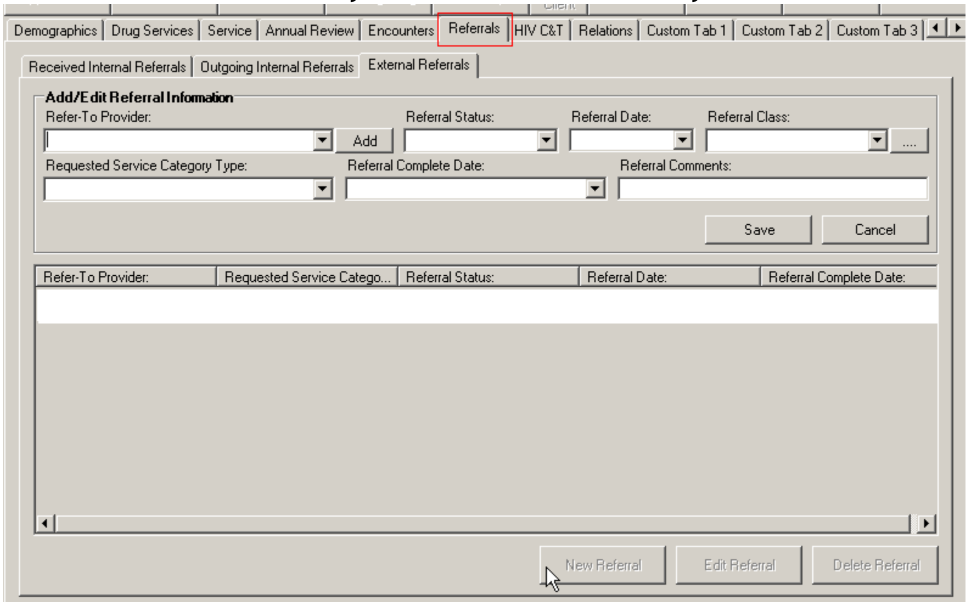


<u>Very Important:</u>

If CW asks if you want to create a Primary Care service when clicking away from the Encounters tab, always click NO.

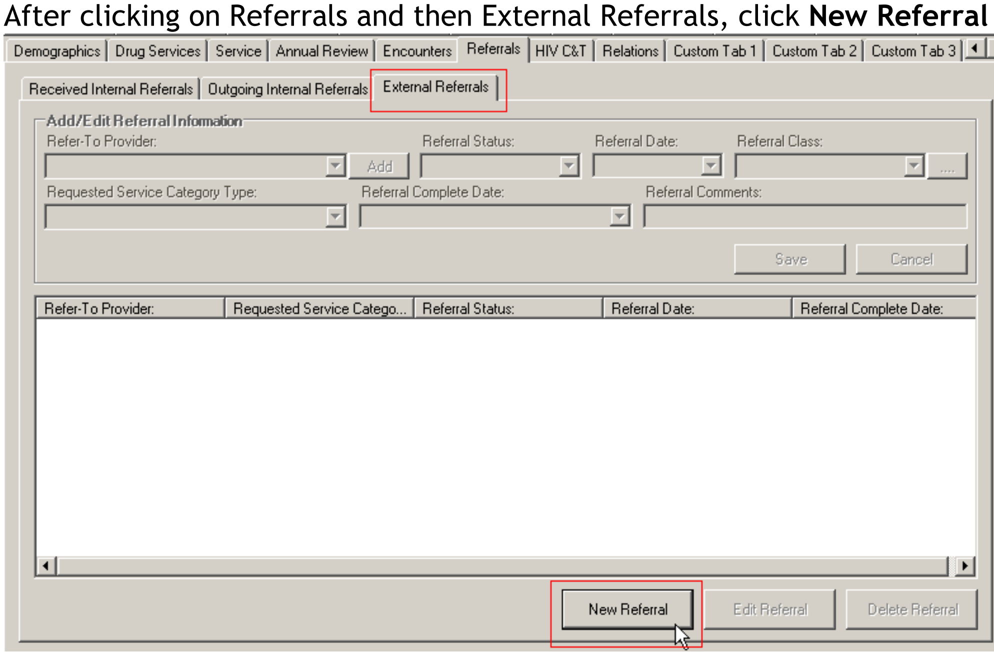


5. After the assessment results are entered, any assessments resulting in an accepted referral **must** have that referral entered using the Referrals tab. You don't need to enter anything on the Referrals tab for clients who did not initially receive a referral for any reason.



The majority of referrals made will be to providers outside of the HAP CAREWare network, so you will enter them using the ***External Referrals*** tab within Referrals.

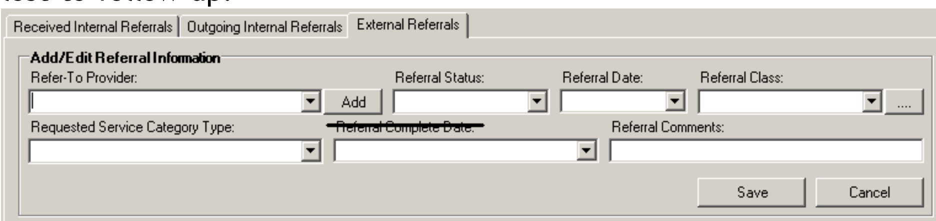
After clicking on Referrals and then External Referrals, click **New Referral** to begin entry.



6. Complete the referral fields for the initial referral.

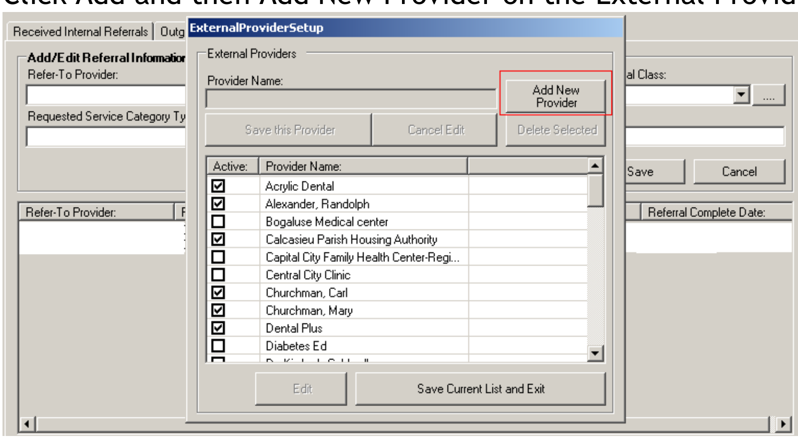
Every referral initially entered should have:
Refer-to Provider
Referral Status
Referral Date
Referral Class
Requested Service Category Type

You will **NOT** enter the Referral Complete Date until the referral has been completed or the client is lost-to-follow-up.



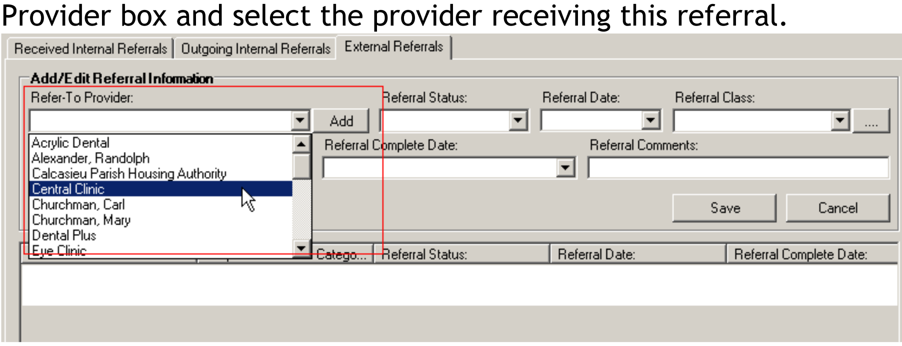
<u>Refer-To Provider</u>
This is the provider you are referring the client to. The **Add** button next to this field should be used to set up the names of the providers used for referrals.
To add providers:

a. Click Add and then Add New Provider on the External Provider Setup box that appears



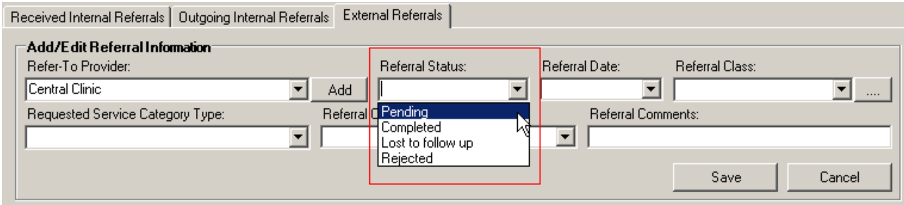
b. Enter the name of the provider receiving the referral and click Save This Provider.
c. Click Save Current List and Exit button to return to the referral entry screen.

After you've added any providers not already on the list, click the down arrow next to the Refer-To Provider box and select the provider receiving this referral.



Referral Status

When initially made, all referrals will be **Pending.** You will change this status again when there is an outcome for the referral.

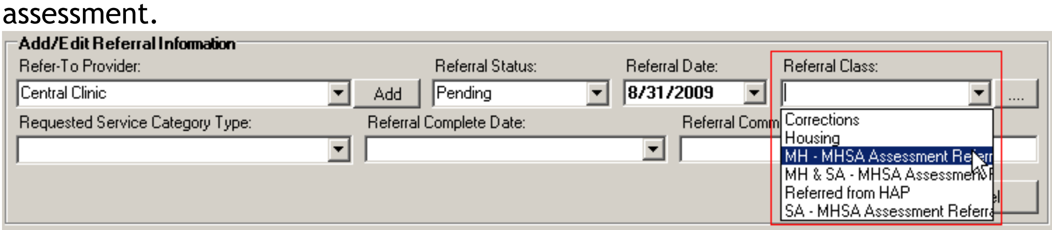


Referral Date

This is the date you make the referral for the client. It is usually the same date as the assessment.

Referral Class

Select the option that reflects what assessment this referral is related to. Since CW does not automatically link referrals and encounters, this field is used to show that the referral is tied to an assessment.



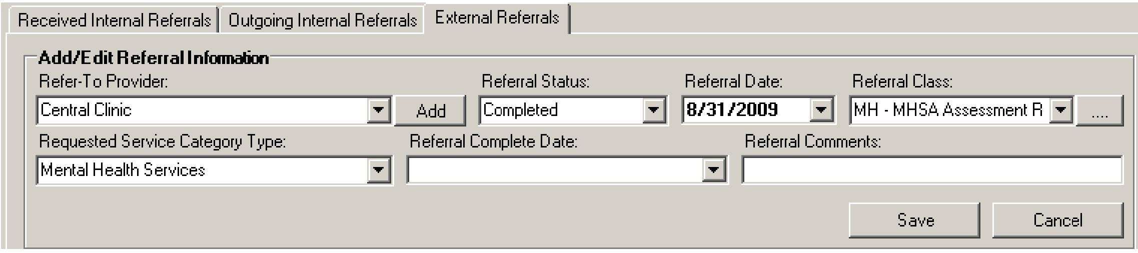
Referral Type	Referral Class
Mental Health	MH – MHSA Assessment Referral
Substance Abuse	SA – MHSA Assessment Referral
Domestic Violence	Domestic Violence Referral
Mental Health AND Substance Abuse *(if need was indicated for both and if referred to same provider for both)*	MH & SA – MHSA Assessment Referral

Requested Service Category Type

This field should reflect the HRSA Ryan White service category corresponding with the referral being made. Service units are not assigned, only a category.

Referral Type	Service Category
Mental Health	Mental Health Services
Substance Abuse	Substance Abuse: Outpatient
Domestic Violence	Non-Medical Case Management

An initially completed MH assessment referral should look like this:



Notice that the Referral Complete Date is left BLANK.

Click the SAVE button once you have entered all of the information.

7. **Entering outcome for referrals:** Once a client has either been to their referral appointment, is considered lost-to-follow-up, or has later refused the referral, you will go back to the client's External Referral screen in CW to update the referral.

   Once on the same client's External Referrals screen, click on the referral you are updating and click Edit Referral.

   Change the **Referral Status** to the correct outcome and then enter the date that the referral outcome was made as the **Referral Complete Date** (the date the client went to the appointment, was considered lost-to-follow-up, or refused the referral).

   Click SAVE and make sure the updated information appears in the referrals summary.